**Polk County Positive Behavior Support Network**

**July 1, 2018 – June 30, 2022 Strategic Plan**

**Strategic Plan Overview**

1. Strategic Plan Framework
2. Strategic Plan Development Process
3. Where Are We Now?
4. Where Do We Want to Be?
5. How Do We Get There?
6. How Do We Measure Performance?

**I. Strategic Plan Framework**

Positive Behavior Support (PBS) is a values based approach designed to prevent interfering behavior rather than correcting or punishing the individual. PBS marries the skills of teaching and prevention by arranging the environment in such a way that interfering behavior becomes an irrelevant, inefficient, and ineffective means of communication. PBS strategies are empirically based to facilitate the evaluation of change efforts. The goal is to invest in the strengths and abilities of the individual, not with the focus of “fixing” the individual.

The Polk County PBS Network is a multi-agency collaboration among Broadlawns, Candeo, ChildServe, Community Support Advocates, Crest Services, Easter Seals Iowa, Eyerly Ball, Goodwill of Central Iowa, Hope, Link Associates, Lutheran Services in Iowa, Mainstream Living, Mosaic, Optimae Life Services, Polk County Coordination Agencies, Polk County Health Services, Polk County Integrated Services, Progress Industries., Goodwill Industries, Broadlawns and Hope

The PBS Network Strategic Plan is a 3-year plan intended to provide guidance and accountability. The PBS Board is made up of 8 elected individuals from the member agencies. The PBS Board updates and periodically reviews plan progress. The plan addresses important questions and provides both a short and longer term direction for the PBS Network. Questions which address commonly used terms are defined below:

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| --- | --- |
| **Term** | **Question Addressed** |
| Mission | What is our primary purpose? |
| Vision | How should we achieve our mission? |
| Core Values | What core beliefs guide our decision making? |
| Operating Principles | How should services be delivered in Polk County? |
| Strategic Commitments | What are the most important things we need to do to move forward in support of the services vision? |
| Pinnacle Issues | Which areas are not in harmony with the PBS vision, operating principles and/or our mission, vision, core values? |
| Goal | What do we want to accomplish in the future? |
| Objective | What do we pledge to accomplish in the next 3 years? |
| Task | What actions will we use to achieve our objectives? |
| Projected Cost | What is the estimated value of financial, human, technological, and other resources? |
| Measures | How do we measure progress toward fulfilling our mission? |

**II. Strategic Plan Development Process**

This is the PBS Network’s sixth Strategic Plan. The plan development process was spearheaded in November 2017 when the PBS Board met with Chad Volbkert, VP at John Deere and strategic planning specialist, for a Board Strategic Planning Retreat. In March 2018, the Board shared information from the retreat with PBS Network agency representatives at the Quarterly Membership meeting and collected feedback. This Strategic Plan was created by incorporating the discussions and feedback from these meetings into the overall vision of the PBS Network.

# **Relevancy**

PBS as practiced in Polk County is a values based approach that is designed to prevent interfering behaviors rather than correcting the individual. It is the marriage of teaching and prevention, by arranging the environment in such a way that interfering behaviors become irrelevant. It is empirically based to facilitate the evaluation of change efforts. The goal is to invest in the capacity of the person, not focus on correction of the person. The emphasis on values based approaches that invest in the person ensures services are driven by the individual’s hopes, dreams, barriers, needs, and successes in a systemic environment that is increasingly moving toward a medical model of service provision. Ensuring PBS values are at the center drives high quality services for the individuals supported.

Within the PBS Network service system, individuals are presenting with more complex needs, including co- and multi-occurring diagnoses. Many conventional approaches to serving this population are focused on decreasing interfering behaviors through restriction and addressing the symptoms, and in turn are less effective in meeting the needs of these individuals. PBS uses individual-specific approaches, focusing on empowerment and addressing cause, meaning a person’s needs are foremost considered.

The PBS Network, being composed of like-minded agencies with common goals and values, provides each agency, and the Network as a whole, with a broad base of experience, skills, and resources which in turn better braces the Network for challenges and sets it up for new opportunities. The shared purpose and partnerships lead to better outcomes for individuals supported in our service system.

**III. Where Are We Now?**

The PBS Network began in 2005 with a handful of agencies and has now expanded to 18 collaborating agencies and PBS Teams. Over the past 13 years, the PBS Network has provided numerous and varied training opportunities, developed strong and reciprocal partnerships, created a website and resource library, and continued to meet needs of individuals with ever increasing and complex needs. The high-quality services provided through PBS Network partnerships, in alignment with PBS philosophy and practice, are captured in annual outcomes data collection. The PCHS data shows steady improvement over time of many quality of life measures, such as access to somatic care, engagement into community activities, competitive employment, and participation in adult education opportunities. It also shows a consistently high level of participant and concerned others satisfaction, including a specific measure of how individuals rate their overall quality of life.

The Fiscal Years 2016 and 2017 brought many challenges to the PBS Network Agencies including initiation of Medicaid Managed Care Companies, changes to MHDS regions and multiple changes in rate and pay structures. Due to these external changes, the PBS Board has put significant efforts into supporting, communicating and uplifting the PBS Network agencies by providing training, communication and uplifting quarterly meetings.

**IV. Where Do We Want To Be?**

will support our agencies through target training, on going communication, The foundation of the strategic plan rests on the PBS Network’s mission, vision, and core values. By implementing the identified strategic commitments, we will support our agencies through target training, on going communication, and meaninful quarterly meetings. The basis of our trainings will ensure support with workforce development, person centered planning and leadership development.

Susan typed up the rest, will need to get wordage from her

# **PBS Mission**

To promote innovative, positive supports for persons served through inter-agency collaboration.

# **PBS Vision**

Network agencies will utilize shared philosophy and learning opportunities to promote an enhanced quality of life for people.

# **PBS Core Values**

We make decisions based on our values:

* **Dignity and respect**: Network agencies will honor the inherent worth and individuality of each person.
* **Training and Education**: Network agencies will be offered a variety of training opportunities to enhance best practices.
* **Person Centered Excellence**: Network agencies will incorporate each person’s passions and priorities and provide opportunities for the person to continue to address their interests, concerns, and dreams.
* **Informed Choice**: Network agencies will assist people to fully understand costs and benefits of all available options before making a choice.
* **Growth and Development**: Network agencies will engage in facilitated learning opportunities to help all people reach their fullest potential.

# **Polk County Region System of Care Principles**

The PBS Network supports a system of care to improve health, hope, and successful outcomes for Polk County residents who have mental illness or intellectual/developmental disabilities, including multi-occurring substance use issues, health issues, physical disabilities, brain injuries, and other complex human service needs. The system of care is based on the expectation that individuals and families will have multi-occurring issues of all kinds. Partnering together, we will develop services that are:

* Welcoming and accessible
* Able to emphasize integrated screening, early identification, and early intervention
* High quality and, wherever possible, evidence-based services
* Organized into a seamless array of community based support
* Individualized to each consumer with planning that actively involves the individual
* Provided in the least restrictive, appropriate settings
* Designed to empower individuals and families as partners in their own care
* Designed to leverage multiple financing strategies within the region, including increased use of Medicaid funded service and the Iowa Health and Wellness Plan
* Supported by the provision of training and technical assistance to individuals and families, as well as to providers and other partners

**V. How Do We Get There?**

Strategic commitments emphasize the areas which the PBS Network identifies as vital to its continued growth and improvement. Objectives are prioritized using the following key:

1 = Highest Priority

2 = High Priority

3 = Priority

# **Strategic Commitment Area: Creating A Meaningful Life**

**Pinnacle Issue:** It is a foremost priority that individuals in our service system are treated with respect and dignity. Individuals served may have co-occurring diagnosis and keeping them safe can be managed by utilizing positive behavior support approaches. Many conventional approaches to serving this population are focused on decreasing interfering behaviors through restriction and addressing the symptoms, and in turn are less effective in meeting the true needs of these individuals. PBS uses individual-specific approaches, focusing on empowerment and addressing cause, understanding why the behavior is occurring, meeting a person’s needs are foremost considered.

**Goal:** Organize and utilize quantitative data.

# **Priority #1- Develop and Implement New Metrics**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start Date | Target Completion Date | Actual Completion Date |
| Investigate & develop meaningful metrics to show the value of PBS. Share with PBS members   * Investigate * Identify baseline measures (what are our baselines going to be, what do we want to collect data on) * Develop a collection process | Jen Muller / Bonnie McHugh | 12./201/2018  07.2018  07.2019  098.2019 | 7./201/2021  06.2019  098.2019  10.2019 | 06.2019  Completed (Date?)  completed (date?) |
| Develop SharePoint use for PBS board related acts  (replaced strategic scorecard) | Maria Walker | Dates | Dates | Dates |

# **Priority #2- Collect and Publish Testimonials from clients, DSP’s front line supervisors and CEO’s**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start Date | Target Completion Date | Actual Completion Date |
| Gather front-line supervisor testimonials.   * Build into annual board calendar * Possibly collected by mentors | Maria Walker / Kathleen Larson /  Bonnie McHugh | 01375./201/20198  0137.20201988 | 6./2030/1802810.2020198  02810.2020198 | \_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_ |
| Create a template for quarterly membership meeting success stories and leadership success story/PBS tools.   * Create a process for collecting completed templates (need to look into picture release) (Be neat to encourage person served to be present at meeting when the staff is sharing their story) * Look at creating a template for clients and have a client spotlight every other quarterly meeting (2x a year) | Jacque Brock  James Miller/Jennifer Muto  Kathleen Larson | 075./201/2018  1/2021  \_\_\_\_\_\_\_\_ | 01196./201/20198  ongoing  \_\_\_\_\_\_\_\_\_\_ | 02.2019  ongoing  Complete: Date |
| Create an E-Book/bragging book with PBS success stories   * Use during breakfast during CEO’s, when on-boarding new agencies, using on website under the “about us” tab (is there way to have a short snip bits on the TV during the CEO breakfast meeting? Something eye catching and easy to read?) * Recruit Kelsey to work on this as she is doing the social medial | Maria  Walker / James Miller /Jennifer Muto | 027./201/2019  04.20198 | 0  47./201/20219  05.2019 | \_\_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_\_\_ |

# **Strategic Commitment Area: Network Sustainability/A Community of Providers**

**Pinnacle Issue:** *The PBS Network is a leader in the advocacy and implementation of Positive Behavior Supports. The Network consists of members agencies within Polk County, IA and is fully funded by these agencies. The annual membership fee gives member agencies access to networking and training opportunities that are relevant and impactful based on key issues within the current environment. To ensure continued commitment and engagement from agencies within the Network a liaison role has been developed with the intent to foster increased communication and participation. In addition to internal communication, social media will be utilizedlizied to raise awareness of Positive Behavior Supports and industry issues among both internal member agencies and the community at large.*

**Goal:** Develop a format and processes for information sharing and gathering among PBS Network agencies.

# **Priority #1-Establish Structure for Agency Fees, Training Costs and available seats.**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Determine criteria to establish fee scales   * Gather agency employee numbers   + Maria sent email in December | Maria Walker | 20910.2018 | 021.2019 | 03.2019 |
| Update contract on policy regarding fee scale. | Jennifer Lilly | 031.2019 | 04.2019 | 05.2019 |
| Strategically communicate and distribute the new fee scale   * share policy at CEO breakfast | Jennifer Lilly | 05.2019 | 06.2019 | 05.2019 |
| Implement new fee scale policy. | Maria Walker | 066.2019 | 07.2019 | 07.2019 |

# **Priority #2-Develop a Social Media Presence to increase Networking**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Create a Social Media Plan that includes establishing who to follow.  (Does this become a new board role or seperate social media committee within PBS?)  Impliment Plan | Bonnie McHugh | 100.20198  03.2020 | 0301.202019  07.2020 | 8/2020  8/2020 |
| Identify individual(s) authorized to post content. | Maria Walker | 01.202019 | 03.202019 | 8/2020 |

# **Priority #3-Continue to develop liaison role**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Establish a consistent message to liaisons at end of each board meeting (Create a 3-5 sentence blurb and send to liaison assignments) | Kelly Ocasio | 04.2019 | 07.2019 | 07.2019 |
| Obtain secondary point of contact for each member agency.   * Collect via email | Kelly Ocasio | 04.2019 | 07.2019 | 07.2019 |
| Develop a survey for primary and secondary liaisons, to gather information on liaison partnership. (This survey will be conducted 1x’s/yr.)   * Develop a survey (KO send a rough draft) * Determine frequency of sending out survey and add to calendar * Implement Survey | Jen Muller | 07.2019  07.2019  01.2020 | 01.2020  01.2020  Spring 2021 | 4/2020  \_\_\_\_\_\_\_\_ |

# **Priority #4-Enhance Networking and Community Outreach**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Develop future tasks for FY ’21   * Alignment with children’s collaborative (Jointly – Julie Gibbons) * Restorative practices * Looking for different outreaches | Bonnie McHugh / Jen Muller / Maria Walker | 1101.2019 | \_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_ |

# **Strategic Commitment Area: Staff Development**

**Pinnacle Issue:**The PBS Network supports a system of care to improve health, hope, and successful outcomes for Polk County residents with intellectual/developmental disabilities or mental illness. Providing training to develop staff has historically been a strategic advantage and a key benefit to PBS Network Member Agencies. As funding sources continue to be challenged, it will remain mission critical that we provide learning opportunities, staff development, and training in a variety of ways. To ensure continual improvement, it will be essential to streamline effective ways to support outcomes, expand resources, solidify roles and structures, and to promote the positive thinking philosophy.

**Goal:**Expand learning opportunities for member agencies by creating new and meaningful methods to learn from each other.

# **Priority #1: Explore and Develop Engagement Opportunities for DSP’s and PBS Members for Networking**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Develop a plan for front-line supervisor networking as a part of Train the Trainer curriculum development.   * Will be done via the FLS-TTT collaboration   (can we incorporate basecamp into this?)  (Push out dates to see how next cohort goes. Possibly bring cohorts together) | Maria Walker / Jen MutoKelly & Maria  (?) | \_\_\_\_\_\_\_ | \_\_\_\_\_\_19 | \_\_\_\_\_\_\_\_\_ |
| Implement front-line supervisor networking via face to face meet and greets and utilizing basecamp  (Seating assignments at meeting to help push networking . . . out for appetizers and drinks after last day . . . those who get certified have a 1 year celebration?) | Maria Walker/  Jennifer Muto | 06.202017 | On-going | Ongoing |

# **Priority #2: Increase Available Resources: Training Slides and Pool of Trainers for the PBS Network member agencies**

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| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Attach training materials in email to agency liaisons. | Kathleen Larson | 07.2018 | On-going | On-going |
| Collect data on how training experiences are shared with home agencies.   * Develop data tool for information we are seeking * Collection of data   \*future membership meeting topic to look at later on – this will become ongoing | Jen Muller | 085.2019  018.201920 | 1107.2019  06.2021 | Ongoing |
| Identify the gaps/areas lacking in training.   * Through surveys, meetings with liaison, task force, etc. * Develop survey (what trainings are you currently paying for? What areas are you struggling with or experiencing?)   (taking the trainings to the agencies) | Kathleen Larson/Jen Muller | 01.2020  19 | 04.2020  19 | Ongoing |
| Identify a pool of network trainers to facilitate trainings.  Develop a list of trainers and their specialties to share on PBS website | Jen Muller and Bonnie McHugh  Jodie Howie | 048.2020  01.2021 18 | 081.2020  03.202119 | Complete: Date  \_\_\_\_\_\_\_\_ |
|  |  |  |  |  |
|  |  | 04.2019 | 08.2019 |  |
|  |  | 07.2019 | 01.2020 |  |

# **Priority #3: Establish Metrics for Training Attendance**

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| --- | --- | --- | --- | --- |
| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
|  |  | 09.2019 | 03.2020 |  |
| Cascade electronic registration to the academy. | Maria  Walker | 07.2018  03.2020 | 09.2018  03.2020 | 077.2018 |
| Electronically register to show agency’s attendance & spots filled. | Maria  Walker | 09.201802.2020 | On-going05.2020 | 07.2018 |
| Identify CEO interest in training attendance and frequency.   * Provide it during the CEO breakfast, ask if they still want these numbers, and ask what else they want. (ask at next May meeting) * Explore need to track attendance with virtual trainings (is there a way to give people a link?) | Jennifer Lilly  \_\_\_\_\_\_\_\_\_ | 02.201920  \_\_\_\_\_\_\_ | 05.20192020  \_\_\_\_\_\_\_\_\_ | \_\_\_\_\_\_\_\_\_  \_\_\_\_\_\_\_\_ |

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# **Priority #4: Explore and Solidify Academy Structure and Member Role**

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| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Update PBSN standing committee policy and procedure document.   * Identify terms for academy structure and member role   + There is now a Chair and Co-Chair   + Maria gave policy to academy and no recommendations for changes/updates. | Maria Walker | 085.2019 | 10.2019 | 11.2019 |
|  |  |  |  |  |

# **Priority #5: Assess Quarterly Meetings to Ensure Positive Thinking**

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| Objectives | Lead Person | Start  Date | Target Completion Date | Actual Completion Date |
| Bring ideas to start quarterly meetings positively. | Jacque | 07.2018 | On-going | 07.2018 |
|  |  |  |  |  |

# **FY18 Financial Costs**

Plan implementation financial costs cross over strategic commitment areas. The Board manages the annual budget and reports in their annual report. Budget: yearly budget is adopted by the board based on membership revenues.

**VI. How Do We Measure Performance?**

The Board will know it is acting on its Strategic Commitments when it acts on and/or completes the tasks set forth in this Strategic Plan. The Board relies on the Strategic Plan to direct its activities, referring to it when creating the monthly Board meeting agenda. The Board will review the Strategic Plan on a quarterly basis to ensure continued pertinence and hold the Board accountable to the Strategic Commitments set forth. The Board will solicit feedback from PBS Network member agency representatives on a regular basis regarding the effectiveness of the Board in regards to our Strategic Commitments.